Collaborating with designers



What is design?



"Design is deciding how a thing should be."

— William Van Hecke

human-centered design noun

A way of solving problems that centers the experiences and needs of humans throughout the design process.

Not to be confused with...

software design

An engineering discipline of architecting software to meet product requirements in a flexible and scalable way.

Both kinds of design are concerned with how a thing should be. We are focusing on human-centered design.

For the purposes of today's conversation, a single definition:

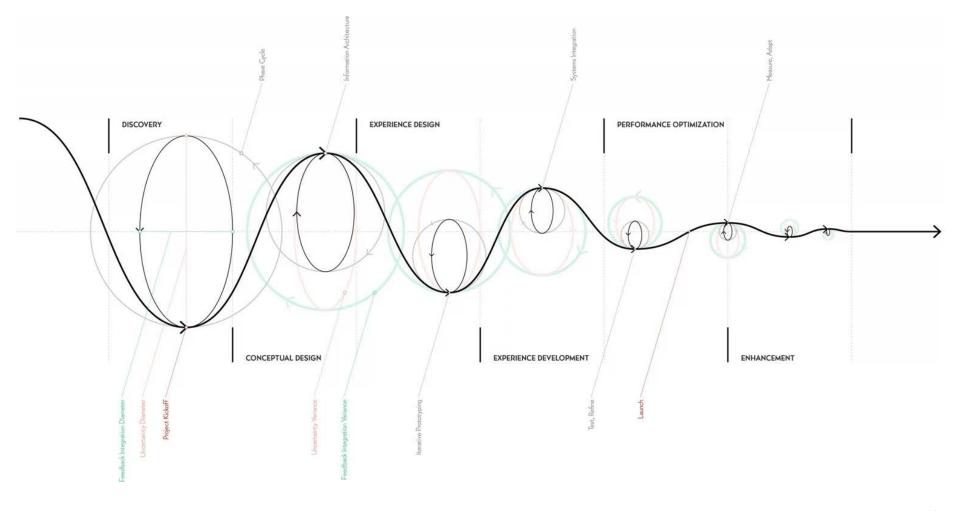
designer noun

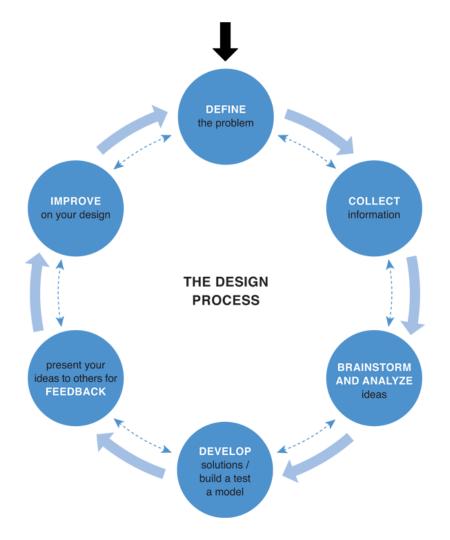
Someone who uses knowledge of human experience to shape the experience of interacting with a particular product or service.

The design process

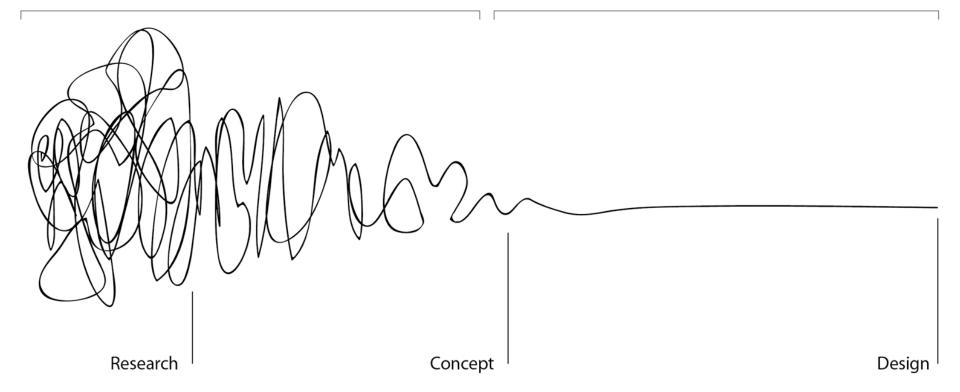


What process do designers use?





Clarity / Focus

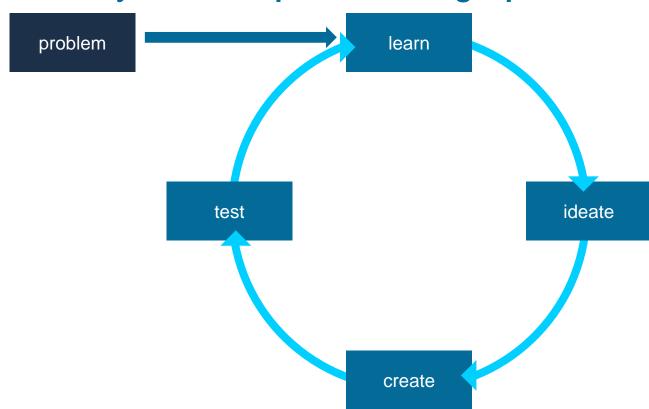


There's no one true design process.

There's no one true design process... but there are consistent patterns.

The design process

A very oversimplified design process



What do designers do?



There are a lot of types of design, and designers have all sorts of specializations.

What do designers do?

A few common types of design

User researchers study people to understand their lives, contexts, and interactions with existing systems.

Visual designers specialize in visual communication — using the way things *look* to convey information and influence interpretation.

UX designers (and interaction designers) shape how people can interact with systems, and how those systems respond.

Content designers are experts in using language to convey ideas to people, most commonly in written form. Designers are often asked to wear many hats, and many are skilled at multiple kinds of design. Someone whose résumé says "UX Designer" may also have great user research and visual design skills.

Someone whose resume says "UX Designer" may also have great user research and visual design skills.

They won't outdo a dedicated expert in those areas, but they can pinch hit comfortably.

What do designers do?

A few things designers do

- Discover what users want a system to do
- Discover what users need a system to do
- Help the team understand users' underlying goals and human motivations
- Create ideas for new products or services
- Sketch ideas for new products and services to help others understand them
- Design systems that are easy for users to understand and learn
- Create interactions that lead users to a desired action or thought process
- Prioritize users' needs

- Run usability tests to understand how well users can understand and use a system
- Use expert analysis to identify usability problems before testing
- Make it easy for users to notice, and fix, errors and bad data
- Create prototypes to test ideas before investing lots of development effort
- Shape how systems look and act to convey a specific personality, tone, or atmosphere
- Shape how language is used to convey a specific personality, tone, or atmosphere

What do designers do?

A few things designers don't do

- Ensure the product vision is fulfilled
- Confirm your preconceived notions, even when they're inaccurate
- Make the design "pop more"
- Make the design "pretty"
- Draw the ideas in your head
- Read minds
- Research every single decision, big or small
- Add UI elements because they were asked to

- Ignore end user needs
- Follow numbers blindly
- Work alone
- "Throw things over the wall" to developers
- Fix the database
- Architect software
- Make the words sparkle
- Prioritize work
- Fetch coffee

Design is not product, but good design is essential to the success of a product.

discussion

What design team do you want?



Building a system that will help city residents use the bus system more easily, with the goal of increasing ridership. 2

Deciding what to do with a statewide repository of public school statistics and performance data.



Publicizing an important new piece of policy about voter registration and identification to eligible voters in your county.

Working with designers



Ask questions instead of... jumping to conclusions.

Learn what each designer specializes in (and what their secondary skills are) instead of... assuming all designers have the exact same skills.

Integrate research and design into your strategy instead of... ignoring design input *or* blindly following what designers say.

Define the outcomes you want instead of... asking designers to implement a predefined solution.

Advocate for user research instead of... relying on assumptions about your end-users.

Explore multiple approaches instead of... doubling down on a single solution early.

Test designs with end-users instead of... arguing about which design is best.

Identify measurable success criteria instead of... choosing the design you "like" the most.

Create space and time for them to do good work instead of... rushing them.

Maintain forward momentum instead of...

leaving designers to explore forever.

Be transparent about project priorities and tradeoffs instead of... forcing designers to guess.

Keep track of the project schedule instead of...
forcing designers to set their own

forcing designers to set their own deadlines.

Provide direction on experience and implementation tradeoffs instead of...

letting designers and engineers "work it out."

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Practice



Imagine you've been tasked with publicizing an important new piece of policy about voter registration and identification to eligible voters in your county.

You have a small team: one user researcher and one content designer. Both of them are moderately skilled at UX design.

What is your plan for working with them? What strategic questions do you need to answer together? Where are you hoping they will lead?

Collaborating with engineers



What is engineering?



Engineering is the practice of building systems that behave in a predictable, controlled manner.

software engineer noun

Someone who architects software to meet product requirements in a flexible and scalable way.

Not to be confused with...

electrical engineer noun

Someone who uses knowledge of electricity, electronics, and electromagnetism to build controlled electrical systems.

computer engineer noun

Someone who uses knowledge of electrical engineering and software systems to develop new computing systems.

*

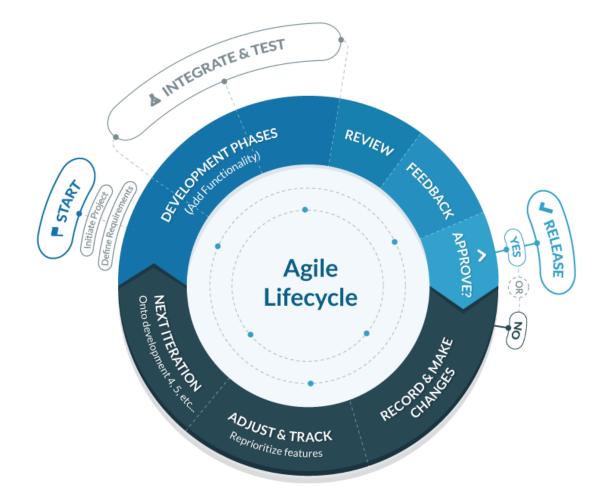
Most engineers know how program computers, but very few of them know how to build flexible and scalable software systems.

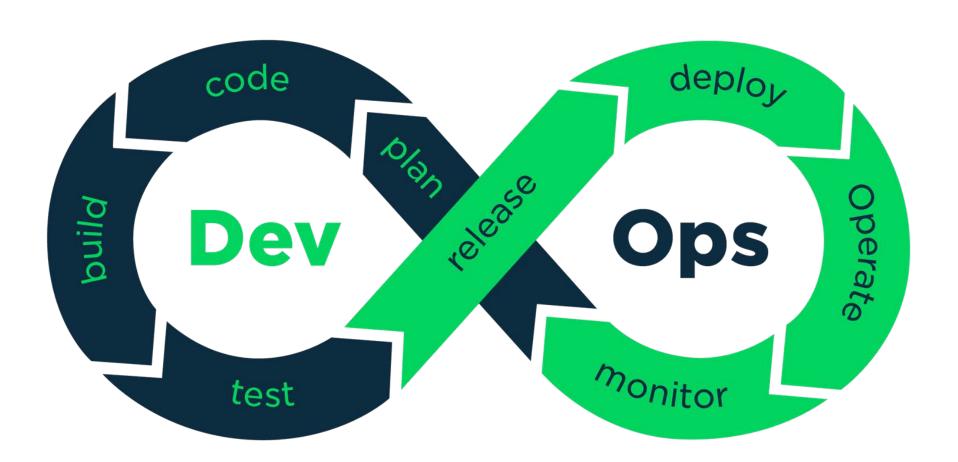
The design process



What process do software engineers use?





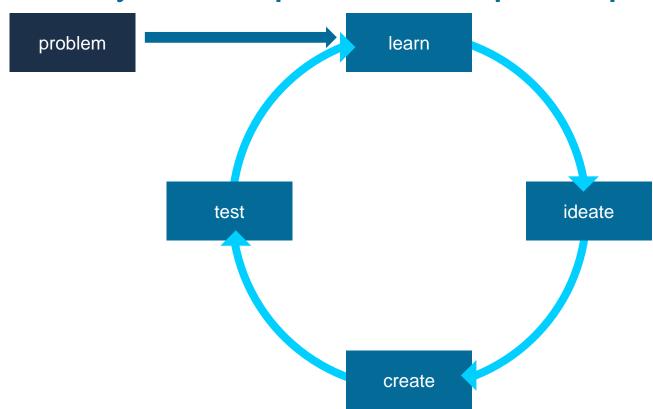


There's no one true software development process.

There's no one true software development process... but there are consistent patterns.

The design process

A very oversimplified development process



What do software engineers do?



What do software engineers do?

A few common types of software engineers

Front-end developers build flexible, scalable UI systems that end-users directly interact with.

Full-stack developers build flexible, scalable UI systems and the back-end systems that manage the data users interact with

Technical architects coordinate the structural design of software systems to ensure that they are performant, scalable, and reliable.

Back-end developers build flexible, scalable software systems that manage the data that end-users create and interact with.

Data engineers wrestle with problems associated with database integration and messy, unstructured data sets so that users have access to data that works.

DevOps engineers create and maintain systems that allow software to be deployed, scaled, and monitored in an automated way.

Many software engineers are skilled at multiple kinds of development.

For example, full-stack engineers are comfortable building complex infrastructure as well as building out the parts of the system that users directly interact with.

What do software engineers do?

A few things software engineers do

- Assess whether or not it's possible to build an idea
- Design a database schema
- Model business rules
- Optimize the performance of a system
- Choose an appropriate software framework
- Choose appropriate software tools
- Understand the security vulnerabilities of a system
- Review other engineers' code
- Help product managers prioritize work
- Create prototypes

- Implement continuous integration tests
- Write unit tests
- Implement telemetry and remote measurement tools
- Write systems documentation
- Make architectural decisions
- Use automated tools to test whether or not a system is accessible
- Use automated tools to test whether or not a system has security vulnerabilities
- Refactor code

What do software engineers do?

A few things software engineers don't do

- Drive the product vision
- Design user research studies
- Design the look and feel of the system
- Prioritize work
- Whatever you say
- Define features

- Write copy
- Ignore technical constraints
- Follow numbers blindly
- Fetch coffee
- Work in a silo
- QA their own work

discussion

What development team do you want?



Building a system that will help city residents use the bus system more easily, with the goal of increasing ridership. 2

Deciding what to do with a state-wide repository of public school statistics and performance data.



Publicizing an important new piece of policy about voter registration and identification to eligible voters in your county.

Working with software engineers



Ask questions instead of... jumping to conclusions.

Learn what each engineer specializes in (and what their secondary skills are) instead of... assuming all engineers have the exact same skills.

Integrate technological considerations instead of... ignoring technical input *or* blindly following what engineers say.

Define the outcomes you want instead of... asking engineers to implement a predefined solution.

Be clear about acceptance criteria instead of...

letting the engineers figure out when a user story is 'done'.

Prototype concepts instead of... doubling down on a single solution early.

Encourage experimentation instead of... insisting on perfection.

Identify measurable success criteria instead of... choosing the implementation you "like" the most.

Invest in automation and architecture instead of... cutting corners to save time early on.

Create space and time for them to do good work instead of... rushing them.

Maintain forward momentum instead of...
leaving engineers to optimize forever.

Be transparent about the balance between speed and quality instead of... forcing engineers to guess.

Clearly communicate milestones instead of...

forcing engineers to set their own

forcing engineers to set their own deadlines.

Provide direction on experience and implementation tradeoffs instead of... letting designers and engineers "work it out".

Include engineers in discussions about vision and strategy instead of... assuming they won't care or have good input.

Expose engineers to real users and their problems

instead of...

'protecting' them from distractions.

Include refactoring when you consider priorities instead of...

letting technical debt build up.

Show them the value they're creating for users instead of... assuming they don't care.

Encourage a culture of collaboration, communication and knowledge sharing instead of... enabling silos.

Practice



Imagine you've been tasked with publicizing an important new piece of policy about voter registration and identification to eligible voters in your county.

You have a small team: two full-stack developers.

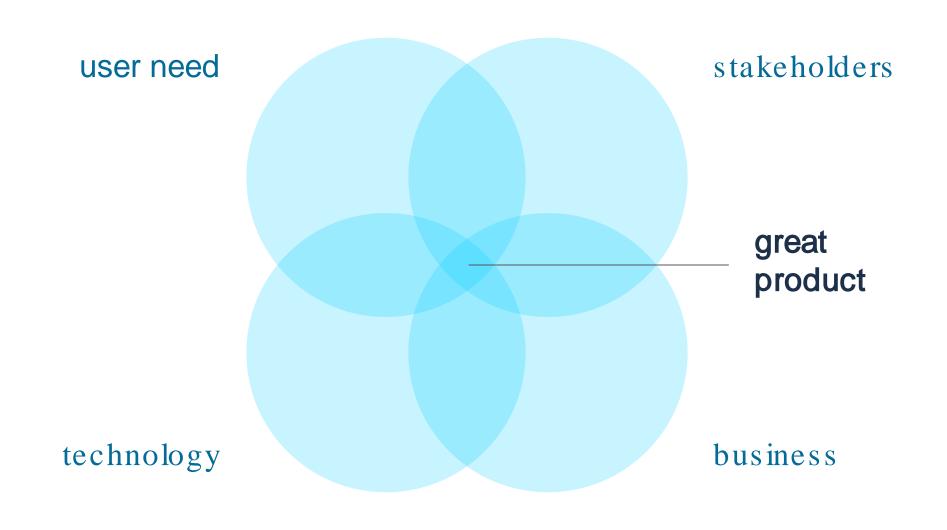
What is your plan for working with them? What strategic questions do you need to answer together? Where are you hoping they will lead?

Leading across disciplines

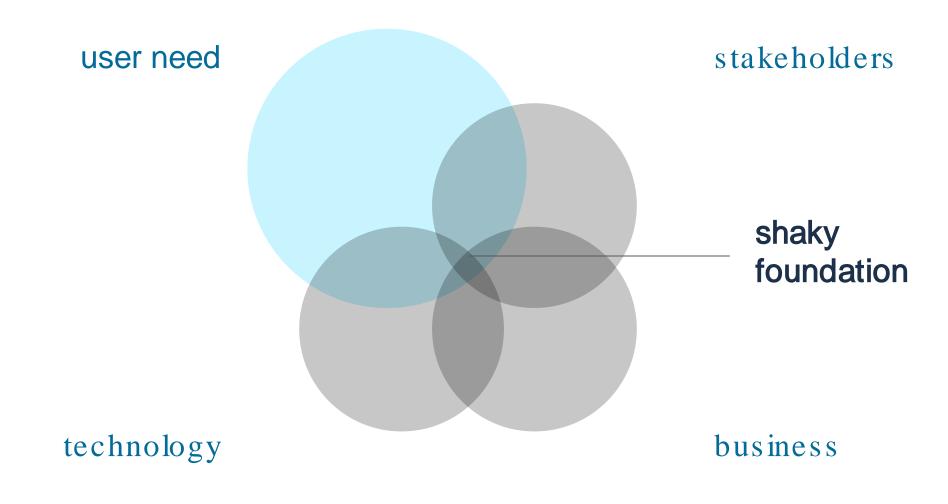


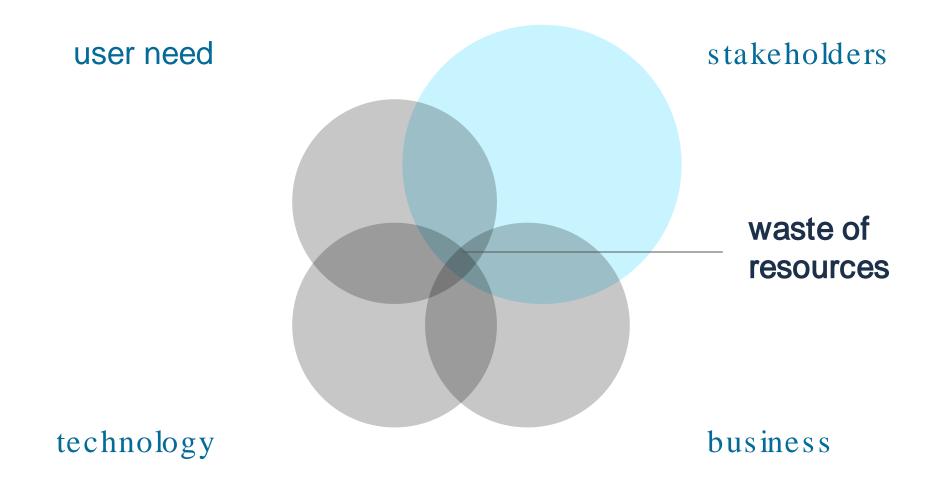
Balance



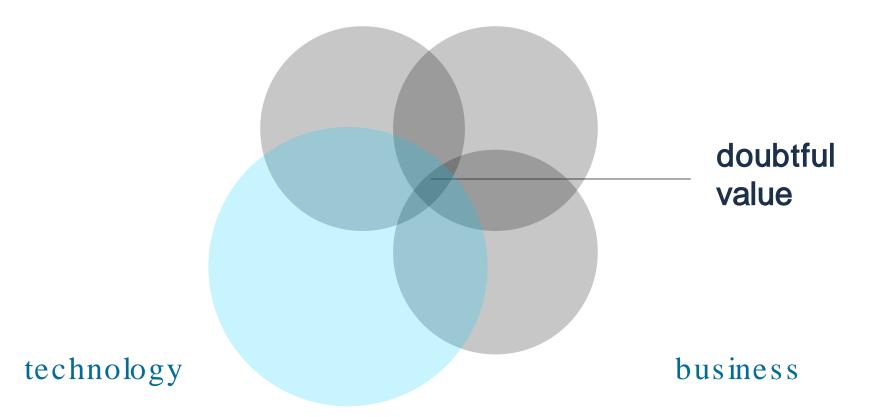


Everyone loses when the product strategy is out of balance.

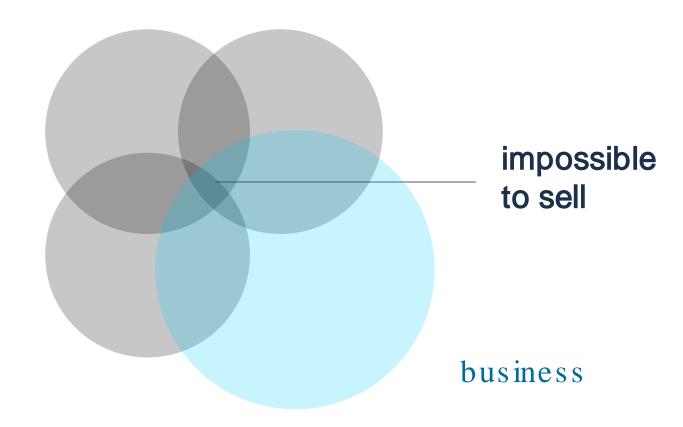




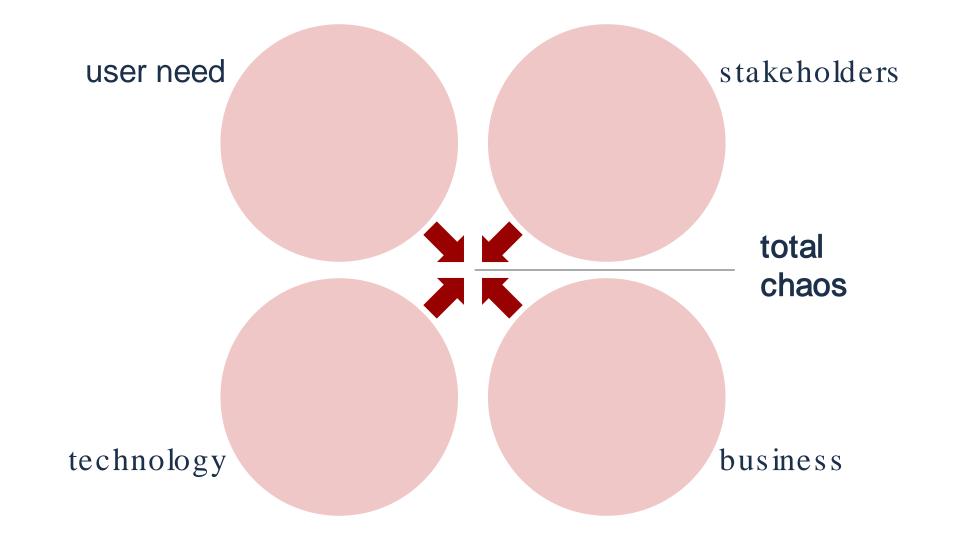
user need stakeholders



user need stakeholders



technology



You have to find the right way to reconcile all of the different inputs and make sensible tradeoffs.

You have to find the right way to reconcile all of the different inputs and make sensible tradeoffs. Your vision statement should help.

Driving from the vision



Your vision statement should acknowledge all of the forces affecting your project. This creates a central point of alignment that you can use to resolve tough conversations as you work.

Creating alignment is work.

Even when everyone agrees on the vision, you still have to drive alignment on how to get there.

Driving alignment



Articulate the goal explicitly



Show your work loudly and often — demos over memos



Create objective success metrics



Groom your narrative regularly

Practice



Imagine you're building an analytics platform to track how satisfied constituents are with local Department of Transportation services.

You've worked hard to get everyone aligned around this effort, but your key executive sponsor has just retired. The new executive says it's a waste of money, because "we already know that the public wants new roads and hates construction."

What do you do?

Your design team is really excited about creating a mobile app where members of the public can report transit problems (like potholes), track the status of their past reports, and see how involved they are compared to other residents.

In preliminary usability tests, multiple users have told you that the design is easy to use, but that they don't want to be compared to their neighbors.

And the department head is uncomfortable with allowing users to track reported issues in detail, because delays related to funding, weather, and other external forces make the department look unresponsive.

What do you do?

The city's Chief Data Officer has told you that the data team can do much more valuable analysis if your app tracks all of the reports about a particular problem over time (longitudinal history) in addition to individual reports.

Your dev team has told you that tracking and correlating all of the reports about a single transit problem will take them at least 8 months to deliver. The Chief Data Officer argues that it shouldn't take them nearly that long.

What do you do?

You're trying to create a simple interactive app to test some of the new concepts the design team has come up with.

Your dev lead has estimated several months of development time to do this, and when you ask why, they explain that there is a lot of infrastructure that the team will need to build to support this experience properly.

Your dev lead argues that the team will have to do the work eventually to build out the app, and that it's better to create scalable infrastructure now so that the team won't have to refactor it later.

What do you do?

You are working with a client who has a dataset around health outcomes by region and they want to create a visualization of the data for the public

Your primary stakeholder has very clear ideas about what data to show and how the data is visualized. They "already know what users want" so they don't want to spend time doing research

Your dev lead has already planned a data structure based on the primary stakeholder's vision

What do you do?

Legacy Modernization Basics



What is a legacy system?



In the software world, legacy systems tend to be big, complex systems that are hard to change and expensive to maintain Many times their design is not well understood, and they frequently fail to meet the current or emerging needs of their users

These systems tend to grow out of legacy structures and processes that were not designed to cope with the pace at which the world changes

*

Legacy systems can be 30 years old, or something you just bought off the shelf

How do you know your system is legacy?



You are working with technology or hardware that is hard to support and maintain

As time goes by, the costs of your system increase as benefits decrease for your workers and beneficiaries

You don't know why system workflows are the way they are, and they interfere with users trying to accomplish their goals

The software is not adaptable to changes in the business - if business requirements change, it's hard or impossible for the software to change

The software is not adaptable to changes in technology (mobile, artificial intelligence, data science), or changes in the usage patterns

You are 'locked-in' with a specific vendor because you cannot fix or iterate on the software without that vendor's help

It's hard or impossible to get accurate and useful data from your system because of a lack of data accuracy or integrity across the system

What is legacy modernization?



Legacy modernization is a way of thinking and working that is contrary to the lengthy traditional process of design, develop, install, operate and maintain. It involves continually evolving or replacing outdated systems and processes in order to improve outcomes for all constituents While also reducing costs, improving system flexibility, and improving security posture

Software is never in maintenance mode, and is always being improved, so that you are always in a position to respond to change

Your IT organization is optimized for quick, continuous delivery of value to users, rather than month long deployment cycles

Data is designed to be consistent and meaningful across the entire system, and the right people have access to the right data

Procurements are smaller, and more specific, and there is a variety of non-traditional vendors competing for the work

In this world ... Security is addressed incrementally, rather than at the very end of a lengthy (multi-year) development effort

Why should I care?



Because technologies and user needs are changing fast, systems must change at the same rate or become legacy

Legacy systems cause a number of problems for the organization

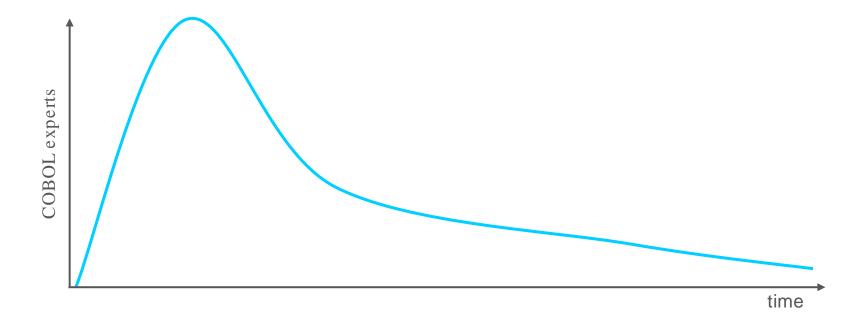
Workers will be less productive as more and more manual workarounds get implemented to compensate for the system's failure to adapt

End users of your system will become frustrated and you will have to spend more time handling complaints than delivering on the mission

Your ability to iterate on the system will be trivial or non-existent, and this will prevent you from finding capable vendors to do the work

You will be unable to easily use the system data to comply with standard audits or custom requests, much less leverage the data for predictive models

You will have trouble hiring staff to operate and maintain the system as it degrades, and as expertise in old technology ages out



In general, legacy systems increase costs in dollars, time, resources and morale, as your ability to execute on your mission continues to diminish

Modernizing will give you a flexible and sustainable system and organization that is responsive to change

So you may better match your business needs and user needs at any given time

And so you can continuously and effectively deliver on your mission

How do I modernize my legacy system?



The first step is to bring ownership of the system in-house and out of the hands of external vendors

Ownership should be at all levels of the organization from business to IT to security and ops

As a whole, the organization defines and measures the desired outcomes for all constituents

And actively holds vendors accountable for delivering those outcomes on a continual basis

To start, identify all of your constituents (users, stakeholders, partners)

Align on a vision of what success looks like for all constituents

Conduct research and workshops to identify your goals & priorities, and schedule them in a roadmap

Build or buy towards that roadmap incrementally and bring users along each step of the way

Be sure to stay connected with users (through research and feedback) throughout the entire migration

Communicate constantly with stakeholders, vendors, and end users throughout the process

Take steps to ensure that you can modernize continually after the initial migration

So that you don't end up with another legacy system in 5 years

What else needs to happen?



To work this way, you'll need an organization, infrastructure and culture that embraces product thinking and adaptability

So that you can constantly identify and respond to changes in user needs, new technologies or new business requirements

Create a strong product practice at your organization to ensure that the product is cared for after the migration is complete

Maintain an up-to-date roadmap at all times informed by continual research into users, existing products and services, new technologies, and organizational or policy changes Ensure that security concerns are dealt with in a way that does not block continuous delivery of value to your users

Managing product risks



Every product effort has risks. Identifying, tracking and managing them from the beginning is critical to product success.

What is product risk?



A product risk is anything that could get in the way of the team achieving the vision

Risks can be internal or external.

Risks can be internal or external. They can be around business, product, project or process.

Risks can be internal or external. They can be around business, product, project or process. They have varying impacts, and likelihoods.

Like anything else, risks change all the time, because the world changes

Like anything else, risks change all the time, because the world changes. So they need to be constantly assessed.

Some risks get riskier over time

Some risks subside over time

New risks can develop at any time

Actively managing risk is an important part of any product process

Managing risk



Managing risk is a practice that helps minimize the impact of threats to the product

The practice of risk management



Identify

Don't wait for risks to find you. Keep an eye out for risks and identify and record them quickly

Define

What is the nature of the risk? What is its potential impact? What is its likelihood?

Prioritize

Which risks do you work on now? Which can wait?

Risk requirement

Risk tolerance

Prioritize the risks that are required, that the team feels comfortable taking, and that you can afford

Financial capacity

Mitigate and measure

Come up with a plan to mitigate high priority risks and work it into your product backlog. Come up with metrics to measure your progress

Communicate

Make sure everyone knows what you're doing to mitigate the high priority risks and what's working

Risks and their status need to be visible to everyone at all times.

Because they affect stakeholders, users and any constituent who hopes to get value from the product

Risk management as a feature



It's tempting to want to avoid talking about risk because it scares people.

But in fact, risk management is already a focus of what product teams build and do. And, that's a good thing!

There is always a risk that security may be breached on a given system, which is why we implement authentication and authorization.

There is always a risk that working on large complex features will result in problematic implementations, which is why we break complex features into smaller ones. There is always a risk that we will miss a critical stakeholder which is why we continually communicate our product story

Protecting your constituents from risk is valuable. So, this work should be called out and prioritized along with any other value you are trying to deliver

So, make a point to bring up risks and talk openly about them with your team and any stakeholders.

Doing this protects your team and opens you up to innovation.

What are your product risks?



End of presentation

Risk Management Cycle



Doing this work will guide the team to an achievable and desirable end state

It will also reduce the impact of failures as everyone will already have aligned on the nature of the risk and why it was taken

Measurement and metrics



Measurement is about creating a feedback loop.

Measurement is about creating a feedback loop. It gives you a way to understand how your product exists in the world.

You're constantly getting feedback about your product, whether or not you measure it consciously.

You're constantly getting feedback about your product, whether or not you measure it consciously. And the information you're getting is biased.

You can't prevent bias, but you can mitigate it by being careful about how you measure things — and how you interpret the data you get.

Using measurement



Measurement helps you:

- * find problems
- * find opportunities
- * prioritize resource use
- * back up your product story

Good measurement leads to action.

*

That action is often "investigate ____"

Different types of measurement

1

Performance metrics tell you whether or not your product is working as intended.

2

Business metrics tell you how well your product supports your organization's goals.

3

Exploratory metrics tell you how people are using your product and help you understand where to go next.

Imagine you're building a website where eligible individuals can register for SNAP benefits.

Usability test performance

Abandonment during signup

Server uptime

Page load time

Usability test performance

Abandonment during signup

57% of users bail out during signup. We should do some testing to find out why!

Server uptime

Page load time

Usability test performance

Abandonment during signup

Server uptime

Page load time

57% of users bail out during sign up. We should do some testing to find out why!

It's because they got frustrated with the process.
We should redesign the flow.

Usability test performance

Abandonment during signup

Server uptime

Page load time

57% of users bail out during sign up. We should do some testing to find out why! It's because they had to find a way to prove their identity. We should investigate that.

Usability test performance

Abandonment during signup

Server uptime

Page load time

57% of users bail out during sign up. We should do some testing to find out why! It's because they figured out they were ineligible. *Signup* isn't the real problem.

Usability test performance

Abandonment during signup

Server uptime

Page load time

Metrics don't tell you why. They just tell you something is happening.

Performance

Usability test performance

Abandonment during signup

Server uptime

Page load time

Performance

Usability test performance

Abandonment during signup

Server uptime

Page load time

Business

Time to complete enrollment

Enrollment system maintenance cost

Number of incomplete or inaccurate applications

Performance

Usability test performance

Abandonment during signup

Server uptime

Page load time

Business

Time to complete enrollment

Enrollment system maintenance cost

Number of incomplete or inaccurate applications

Exploratory

SNAP program enrollment rates

SNAP utilization rates

Sometimes a single metric fits into multiple categories. That's fine!

Exploratory

SNAP program enrollment rates

SNAP utilization rates

Abandonment during signup

Communicating with metrics



As long as your project is funded by other people, you will have to convince them that it's worthwhile.

People like:

- * your manager
- * the legislature
- * a venture capital firm
- * customers

They want to know two things:

1. Why should I care about what you're trying to do?

They want to know two things:

- 1. Why should I care about what you're trying to do?
- 2. Why should I trust you to get it done?

Metrics help you answer both questions. Most people will accept them as a form of proof.

*

It falls on you to use metrics responsibly. Acknowledge biases. Question your conclusions. Don't trust numbers blindly.

We're building a better SNAP enrollment system.

We're building a better SNAP enrollment system because 60% of eligible residents aren't signed up.

We're really happy with this design.

We're really happy with this design. Usability test participants finished enrollment about twice as quickly as with the existing system. We're really happy with this design. Usability test participants completed signup without errors 90% of the time.

We're really happy with this design. Usability test participants told us that they "love this new way of signing up — it's so easy".

Choosing the right metrics



Your metrics should be based on your goals.

Your metrics should be based on your goals. They're how you know if you're meeting the goal or not.

Let's go back to our example: You're building a website where eligible individuals can register for SNAP benefits.

You probably have some goals, like

You probably have some goals, like getting people enrolled more quickly.

You probably have some goals, like making life easier for analysts.

You probably have some goals, like reducing application errors.

Each of those goals should be mapped to one or more metrics.

Goal

Get people enrolled more quickly.

Make life easier for analysts.

Reduce application errors.

Goal

Get people enrolled more quickly.

Metric(s)

Time to complete enrollment

Make life easier for analysts.

Number of incomplete or inaccurate applications

Reduce application errors.



Number of incomplete or inaccurate applications

Usability test performance

Just as you've prioritized your goals, you should also prioritize your

metrics.

The metrics that track your most important goals? They probably tell you the most about how your product is doing overall.

Those are your Key Performance Indicators (often shortened to KPIs).

Practice

Imagine you're in charge of replacing the app that calculates retirement

benefits for agency staff.

What does success look like?

What are your goals for this project?

*

Create at least one business goal, one user experience goal, and one technical goal.

How can you measure whether or not you're meeting each of those

goals?

What do those measures mean? If they spike or dip, what action will you take?

Organizing around value



Scrum overview

Agenda

- 1. What is the opportunity?
- 2. What is a value stream?
- 3. Organizing around value streams

2

What is the opportunity?



The TTS strategy effort is a great opportunity to make explicit the variety of ways we deliver on our mission

It will bring the PIF program, 18F, Acquisitions and OPP all under a single vision And help us settle on an inclusive strategy that enables TTS to deliver the most value to our government and the public

That strategy should clearly articulate the mechanisms by which we produce value consistent with our mission So that we can organize around the highest priority products and services that help us deliver that value

The concept of value streams can help TTS think this through

What is a value stream?



Together, we already provide a great deal of value to the government and people of this country

- Cloud services
- Search
- Consulting
- Custom projects
- Innovation lab
- Security services
- There are probably more ...

Each of these can be thought of as a stream of value flowing to our users

Starting with a trigger or fundamental need

And ending with value being delivered to end users whether they be government or the public

If we identify all of the value streams

And we identify the services and products that support those value streams

We can organize around those that create the most impact

By allocating budget and staff towards achieving that impact

So that we can better deliver on our mission

And by articulating metrics, so that we can measure how we're doing and at regular intervals, and reassess our strategy

Going through this exercise together will help everyone understand clearly who we are and whether we are delivering on our mission

And we will all be able see much more clearly what the priorities are and why

Organizing around value streams



Once we identify and prioritize value streams, it will be easier to see how to organize TTS around them

Staffing

Hiring

Operations

End of presentation



Roadmapping



The point of roadmaps



Product roadmaps are a powerful strategic tool.

Product roadmaps are a powerful strategic tool. They help you keep track of the big picture and correlate every work item to your end goal.

Product roadmaps are a powerful strategic tool. They help you keep track of the big picture and correlate every work item to your end goal.

They also help you stay aligned with your stakeholders.

You shouldn't use roadmaps to forecast exactly *what* will get delivered *when*.

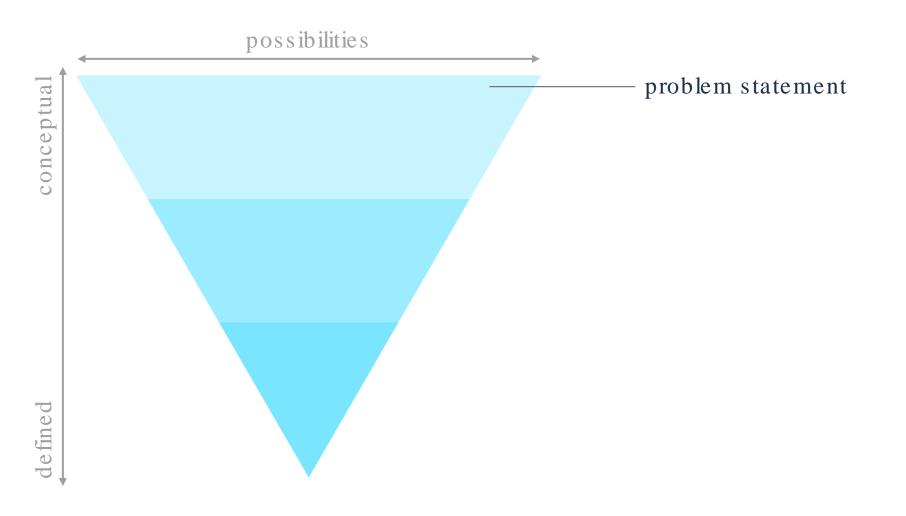
delivered when. They're for planning the order in which you'll tackle the various pieces of the overarching problem.

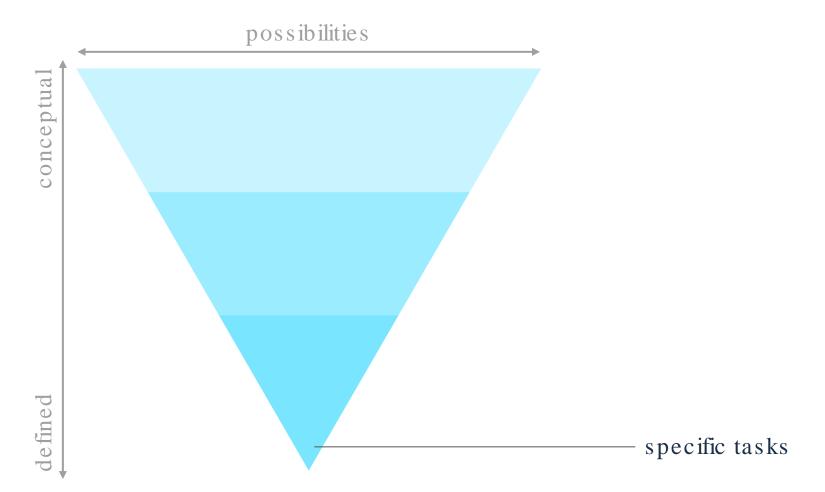
Roadmaps are not a promise.

The spectrum of work

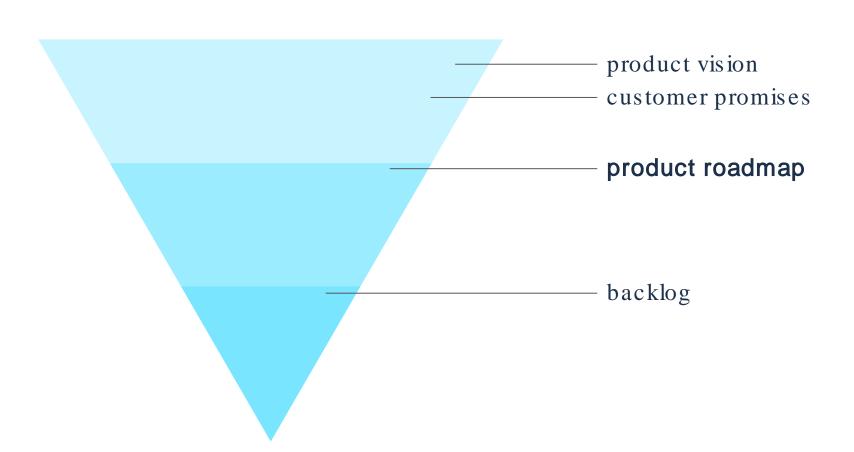


All of the work of building a product lives on a spectrum — you need open-ended conceptual work just as much as clearly-defined execution tasks.





The roadmap is a bridge between your strategic vision and your backlog of work.



Pulling from your customer promises



Customer promises are the backbone of your roadmap. They dictate the scope of the team's work.

The first step to building a roadmap is to put your customer promises into a meaningful order.

The first step to building a roadmap is to put your customer promises into a meaningful order. When in doubt, prioritize.

Imagine you're building a web portal where users can look up their tickets and traffic violations.

Vision

We're creating a way for members of the public to view and address their tickets and traffic violations, so that traffic incidents are resolved more efficiently.

Customer promises

A member of the public can see all of their current unpaid tickets.

A member of the public can see their past tickets and traffic violations.

A member of the public can pay off an unpaid ticket.

A member of the public can initiate the process of contesting a ticket.

Agency staff can track currently unpaid tickets.

Agency staff can see a record of tickets and traffic violations.

Sequencing customer promises



What is the core value proposition of this system? Which of these customer promises most directly support it?

2

Which customer promises must be huge successes? Which ones just need to get completed?



Are there some customer promises that must get fulfilled sooner than others? Which ones, and why?

Prioritizing customer promises

P1

A member of the public can see all of their current unpaid tickets.

A member of the public can pay off an unpaid ticket.

Agency staff can track currently unpaid tickets.

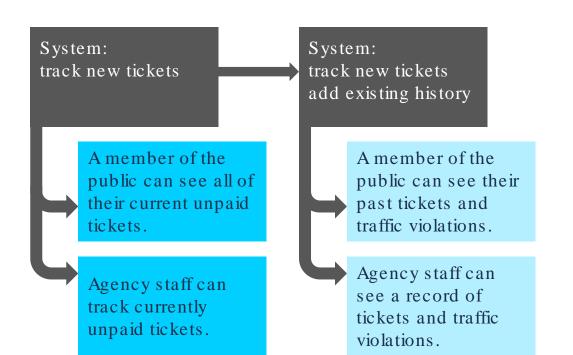
P2

A member of the public can see their past tickets and traffic violations.

Agency staff can see a record of tickets and traffic violations.

P3

Sequencing customer promises



A member of the public can initiate the process of contesting a ticket.

A member of the public can pay off an unpaid ticket.

Once you've figured out the priority, and relative timing, of your customer promises, you can put them into sequential order.

Discussion

If your team could only work on one customer promise at a time, how would you sequence the work?

*

There's no single right answer. The important thing is to have a reason why you've chosen a particular sequencing.

Discussion

If your team work on **two** customer promises at a time, how would you sequence the work?

*

Remember that you don't know exactly how long each customer promise will take — how will you handle that?

Let's imagine that our team is pretty small, and can only focus on one customer promise at a time.

Strict priority order

A member of the public can see all of their current unpaid tickets. Agency staff can track currently unpaid tickets.

A member of the public can pay off an unpaid ticket. A member of the public can see their past tickets and traffic violations. Agency staff can see a record of tickets and traffic violations.

Prioritizing the public

A member of the public can see all of their current unpaid tickets. A member of the public can see their past tickets and traffic violations. Agency staff can track currently unpaid tickets.

Agency staff can see a record of tickets and traffic violations.

A member of the public can pay off an unpaid ticket.

Prioritizing the agency

Agency staff can track currently unpaid tickets.

Agency staff can see a record of tickets and traffic violations.

A member of the public can pay off an unpaid ticket. A member of the public can see all of their current unpaid tickets. A member of the public can see their past tickets and traffic violations.

This is already a (rough) roadmap!

Note that it doesn't tell you when each customer promise will be completed, or even what the solution will look like.

Note that it doesn't tell you when each customer promise will be completed, or even what the solution will look like. It just tells you what order the work will be completed in.

Zooming in



A member of the public can see all of their current unpaid tickets. A member of the public can see their past tickets and traffic violations. Agency staff can track currently unpaid tickets.

Agency staff can see a record of tickets and traffic violations.

A member of the public can pay off an unpaid ticket.

Of course, this roadmap is probably still too high level for the team.

Of course, this roadmap is probably still too high level for the team. It needs to be broken down into more detailed pieces of work.

A member of the public can see all of their current unpaid tickets. A member of the public can see their past tickets and traffic violations. Agency staff can track currently unpaid tickets.

Agency staff can see a record of tickets and traffic violations.

A member of the public can pay off an unpaid ticket. A member of the public can initiate the process of contesting a ticket.

track new tickets

user account creation and management

associate tickets with user accounts

display tickets

Each of these items can get broken into more detailed tasks, too.

track new tickets

user account creation and management

associate tickets with user accounts display tickets

create new account

log in/out (session management)

associate account with legal identity

account recovery (password reset)

And so on, until you have bite-sized pieces of work.

Each piece of work connects logically to an overarching customer promise.

A member of the public can see all of their current unpaid tickets.



track new tickets

user account creation and management

associate tickets with user accounts

display tickets



create new account

log in/out (session management)

associate account with legal identity

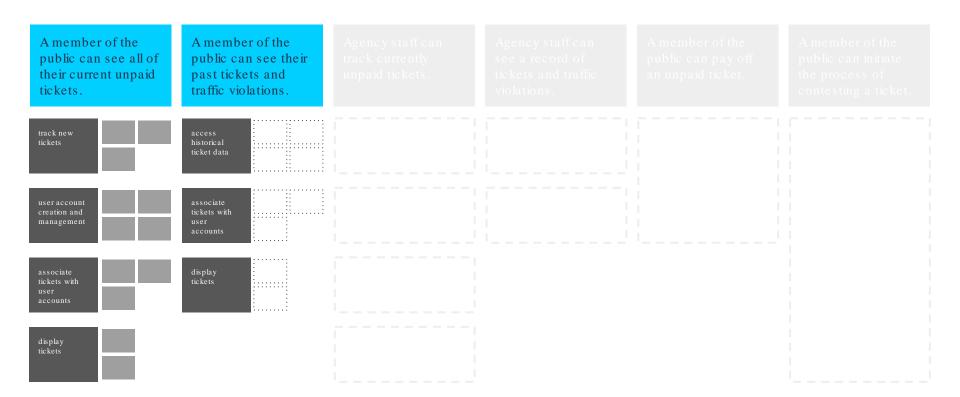
account recovery (password reset)

Stitching it all together



When you zoom back out, you get an all-up view of your upcoming work, anchored to the end value you're delivering.

A member of the public can see all of their current unpaid tickets.	A member of the public can see their past tickets and traffic violations.	Agency staff can track currently unpaid tickets.	Agency staff can see a record of tickets and traffic violations.	A member of the public can pay off an unpaid ticket.	A member of the public can initiate the process of contesting a ticket.
track new tickets	access historical ticket data				
user account creation and management	associate tickets with user accounts				
associate tickets with user accounts	display tickets				
display tickets					



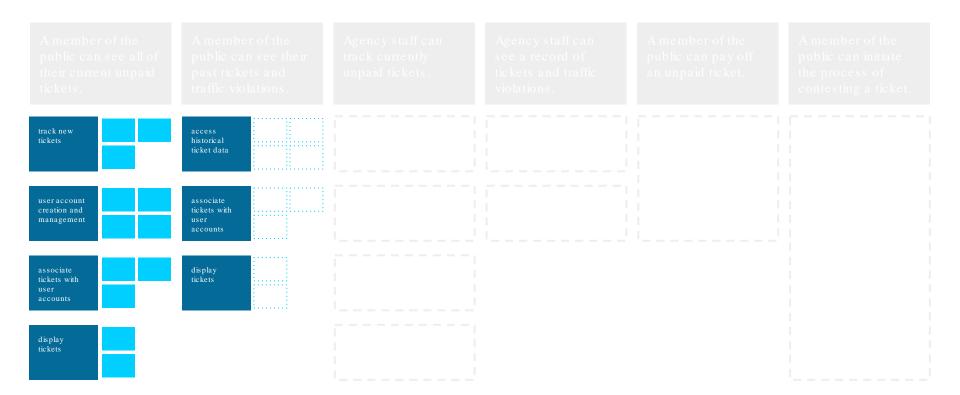
Well-understood work is represented in more detail

	Agency staff can track currently unpaid tickets.	Agency staff can see a record of tickets and traffic violations.	
	Work that comes later is represented in less detail, because it's not well-known		

yet

		A member of the public can pay off an unpaid ticket.	A member of the public can initiate the process of contesting a ticket.

Work that's really far off is just a guess!



This becomes the backlog your team works off of!

Scrum overview



Scrum overview

Agenda

- 1. What is Scrum?
- 2. Scrum Values
- 3. Scrum Roles
- 4. Scrum Ceremonies

What is Scrum?



Once you have a product vision, and a roadmap, you need some kind of a framework to help you execute It should do the heavy lifting around communication and planning so that you don't have to manage that manually

It should also result in continuous, incremental delivery of measurable value

Scrum is *one* agile product development framework that is designed to do these things

The roots of Scrum lie deep in the concept of Lean as it was first laid out for the Toyota Production System (TPS) and introduced as a software methodology in the 1990s

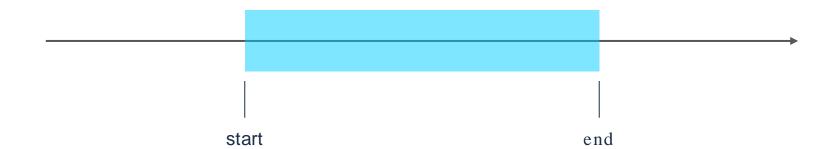
Scrum delivery cycle



Scrum is focused on delivering quality software rapidly and in small increments.

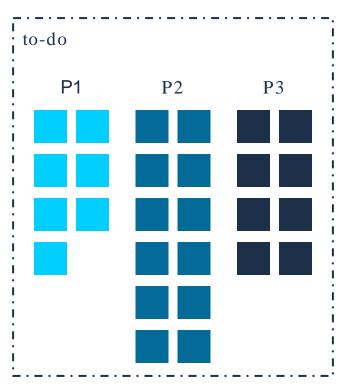
It is also focused on breaking down barriers to communication and optimizing for efficiency.

Teams work in time-delimited iterations called sprints.



Prioritize

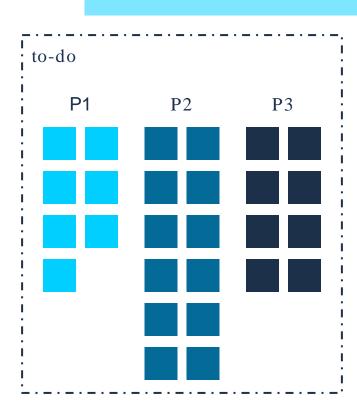
At the beginning of the sprint, work is scoped at a high level and prioritized into a backlog



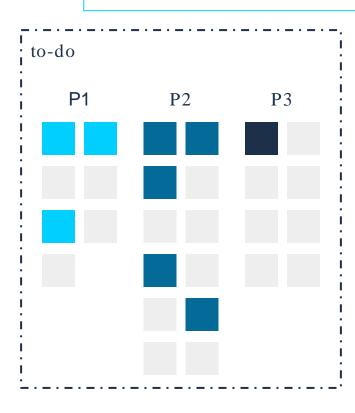
Plan

The prioritized work is then further scoped into small tasks that are grouped together for a sprint



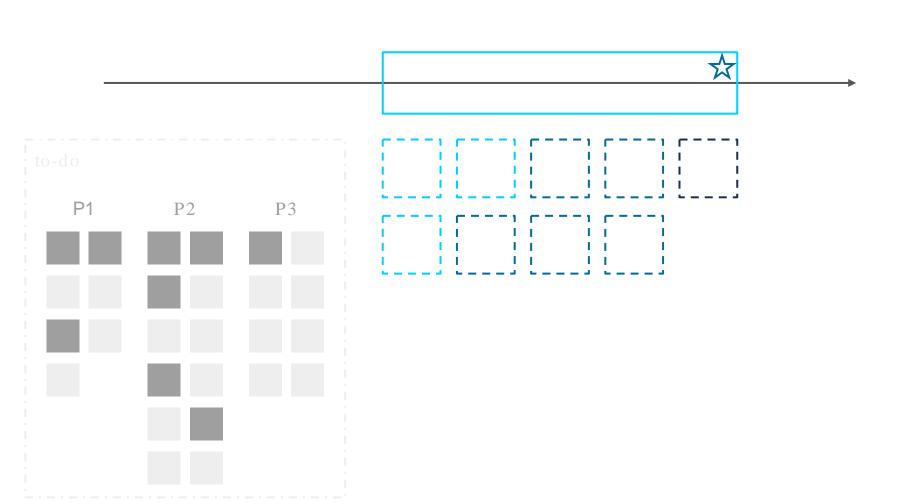


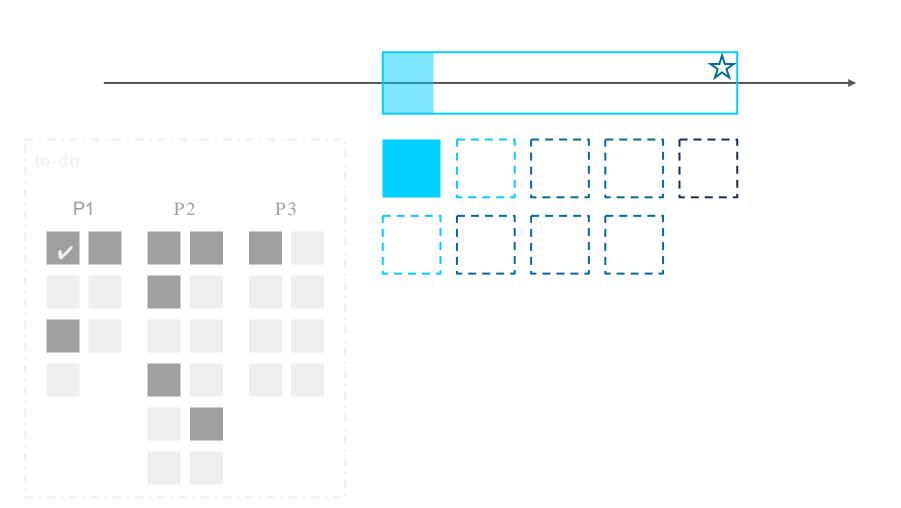


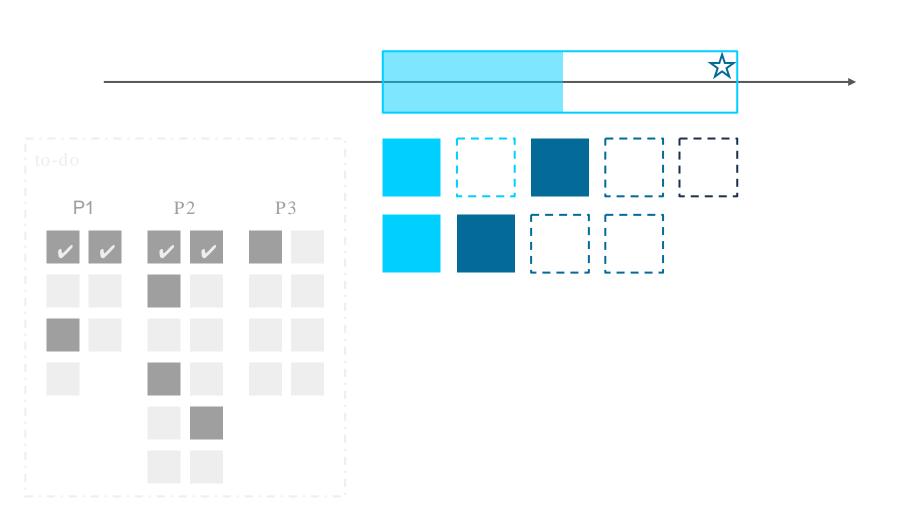


Build

During the sprint teams work only on those tasks, and check in daily to retain their focus

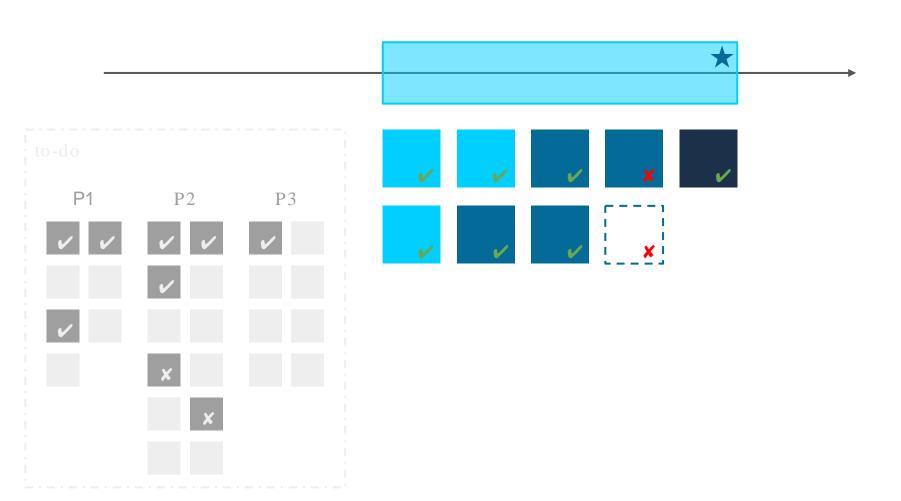


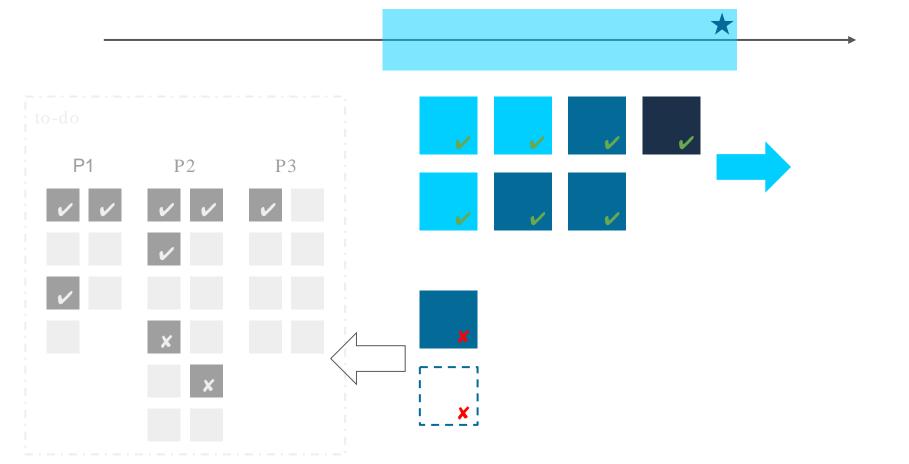


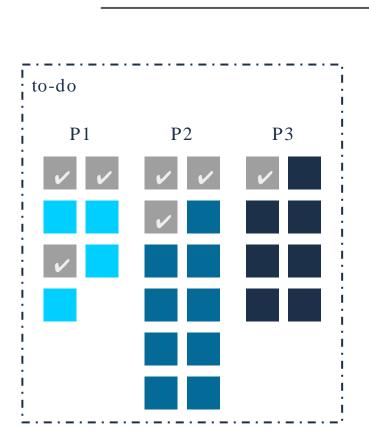


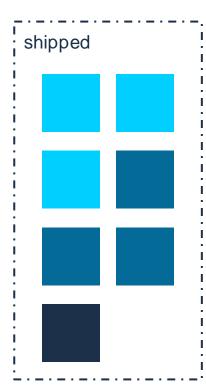
Ship

At the end of the sprint, all delivered work is reviewed and the team decides whether it's ready to shipped (deployed to production)









Reflect

At the end of the sprint, we take time to reflect on how we can better deliver value to our users, either through process improvements, or responding to feedback.

There are lots of variations in the way Scrum is implemented, but they are all based on a core set of values

Scrum values

Focus

Scrum enables the team to focus on priorities, so that value is delivered quickly

We scope work to be small and understandable, so that everyone can align on what to do and why we are doing it

We aim to plan just enough work to get to our sprint goal within the time frame of the sprint

And we focus on just that work during the sprint so that we can meet our goal

Commitment



Commitment is about *dedication* rather than delivering a specific set of features by a deadline.

We commit to the sprint goal.

We commit to focusing on planned work for a given sprint.

We commit to communicating and learning throughout the sprint cycle.

We commit to doing everything we can to continuously deliver value to our users.

We commit to the mission, the level of effort and process, not to specific tasks.

Openness

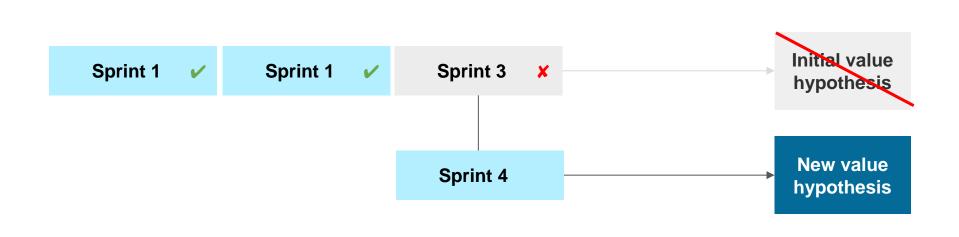


Teams need to be open to changing strategies or even goals, as users start to give feedback.

If the feedback validates our value assumptions, we can continue to build towards it.



If users tell us we're not delivering value, we change our strategy or goal accordingly.



Respect



We respect our users and respond to them when something is not working.

We respect our stakeholders by listening and bringing them along.

We respect the role of the product owner to hold the vision and decide on priorities. We respect the role of the scrum master to drive the team.

We respect the role of designers to advocate for the end user and contribute to the product direction.

We respect the role of developers to determine the technical implementation and contribute to product direction.

Courage



We have the courage to realize that planning does not eliminate change and uncertainty.

We need to have the courage to admit that requirements will never be perfect and we will fail on occasion. We need the courage to speak about our failures so that everyone can learn.

We need to have the courage to change course, sometimes dramatically, when faced with data that contradicts our assumptions.

Scrum roles

The Product Owner holds the vision and directs the priorities of the Product Team

This single point of direction is critical to ensuring the team stays focused

The Product Team is comprised of cross functional subject matter experts that help the Product Owner prioritize, and plan.

They self-organize, with the help of a Scrum Master, to get the work done for each sprint.

The Scrum Master is a facilitator and coach, ensuring that best practices are being followed by the entire team, and removing any blocks to delivering value

They need to have a deep understanding of the product goals, so they can work to optimize value delivery through process management

They are not project managers. They enable the team to self-organize, rather than driving them to stick to a predetermined schedule.

Scrum ceremonies

Scrum ceremonies

Ceremony	Phase
Backlog refinement	Prioritize
Sprint planning	Plan
Daily "stand-up" or "scrum"	Build
Sprint review	Ship
Sprint retrospective	Reflect

These ceremonies are designed to move the scrum development cycle along.

They are intended to facilitate communication and planning, so that the team does not have to do this adhoc.

They are time-boxed (like sprints) and are dedicated to specific tasks.

Best practices



Use these meetings for the purpose they were intended so the team can focus on getting through each phase in the development cycle.

Respect the time-box: if you didn't get to something during the meeting it likely was not a priority. Prepare for Daily Stand-ups by updating the status of your work in your tracking tool (Trello, GitHub, etc), and identifying your blockers.

Prepare for Grooming and Planning meetings by reviewing the work in the product backlog prior to the meeting.

Prepare for Sprint Reviews by making sure you can demo your work to the rest of the team.

Prepare for Retrospectives by thinking about how to improve the team's process, and be open to feedback.

Take turns leading meetings so that no one person is a bottleneck.

Questions?

Was this presentation helpful? What else would you like to see in this overview?

End of presentation

Testing and triage



As a product manager, you're responsible for setting, and upholding, the standard of quality for your product.

Everyone on the team helps find and fix problems.

fix problems. Product managers are the ones making judgment calls about what to fix and when.

Product managers also make sure that there are consistent standards and practices in place. When you're lucky, that means asking the testing lead what process they'd like to use.

When you're lucky, that means asking the testing lead what process they'd like to use. The rest of the time, it means helping the team establish a set of habits.

The basics of testing



You can't ensure that your product is doing what it's supposed to if you're not testing it.

There are lots of different ways to approach testing – as with many things, there's no One True Approach.

There are lots of different ways to approach testing – as with many things, there's no One True Approach. But there are some best practices you can follow.

1. QA people are f*cking awesome

- 1. QA people are f*cking awesome
- 2. Your users aren't your QA team

- QA people are f*cking awesome
 Your users aren't vour QA team
- 3. Automation is critical

- 1. QA people are f*cking awesome
- 2. Your users aren't your QA team
- 3. Automation is critical
- 4. Automation doesn't catch everything

- 1. QA people are f*cking awesome
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- Automation doesn't catch everything
- 5. Testing is a qualitative process

- 1. QA people are f*cking awesome
- 2. Your users aren't your QA team
- 3. Automation is critical
- Automation doesn't catch everything
- 5. Testing is a qualitative process
- 6. Make it a habit, not a production

A mix of automated and manual tests should be incorporated into your workflow.

Automated testing

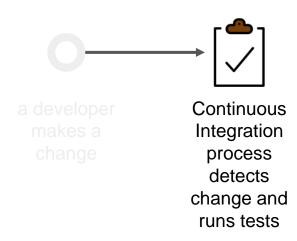


DevOps practices use a lot of automation, with two practices: Continuous Integration and Continuous Deployment.

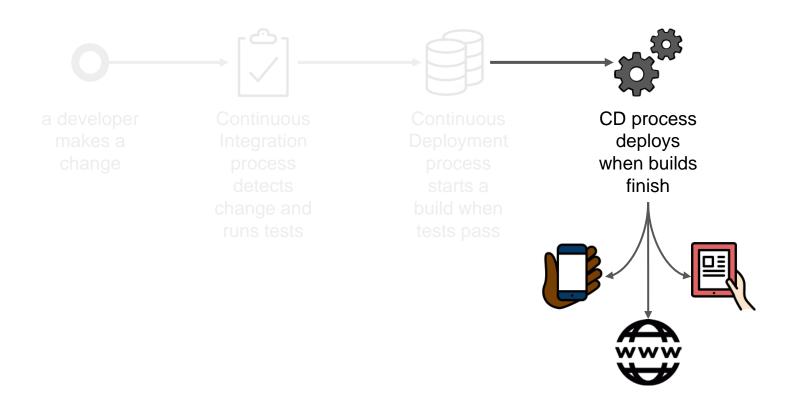
Continuous Deployment. Automated testing is integral to both of these functions.



a developer makes a change









The process of building a backlog



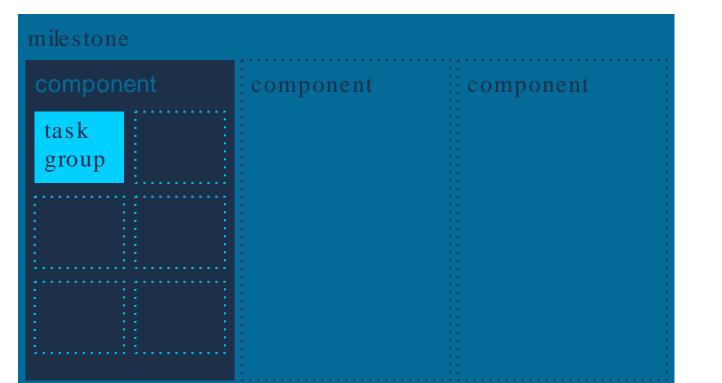
Turning a vision statement and a roadmap into an actionable backlog is an iterative process.

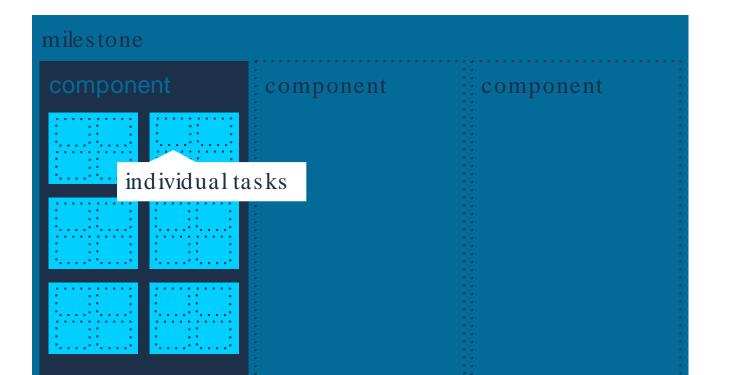
You start with something large and continuously break it into smaller and smaller pieces, until you have something small enough to take action on.

The key is to continually focus on user needs and outcomes (rather than specific implementation details)

milestone

milestone					
component	component	component			
		44			





The way you build your backlog sets the tone for your entire milestone.

The way you build your backlog sets the tone for your entire milestone. You need to make sure your teammates are actively involved and bought in at every point.

Once your team has aligned on big picture priorities, pick the first one and consider:

Whose needs are you addressing?

What are the unknowns?

What activities/teams are involved?

What outcome(s) are you trying to achieve?

How will you know you've succeeded?

The act of breaking down the work will help make priorities clearer.

The act of breaking down the work will help make priorities clearer. It will also highlight any dependencies between team members, which need to be tracked.

Your teammates should be helping you understand, prioritize, and sequence the team's work.

Systematically breaking it down



Talk to the team about what it takes to get there

Talk to the team about what it takes to get there

Identify components of your outcome

Talk to the team about what it takes to get there

Identify components of your outcome

Prioritize and sequence the components

Look at the desired team outcome what

Talk to the team about what it take to get there

Identify components of your outcome

Prioritize and sequence the components

Decide what's in and what's out for this cycle

Talk to the team about what it takes to get there

Identify components of your outcome

Prioritize and sequence the components

Decide what's in and what's out for this cycle

For everything that's in...

Talk to the team about what it takes to get there

Identify components of your outcome

Prioritize and sequence the components

Decide what's in and what's out for this cycle

For everything that's in...

Talk to the team about what it takes to get there

Identify components of your outcome

Prioritize and sequence the components

Decide what's in and what's out for this cycle

And so on...
until you have bite-sized tasks.

For everything that's in...

Imagine your team as a drain pipe: the larger the object you try to push through it the more likely it is that blockages and bottlenecks will occur. Bite-sized tasks keep the flow going.

Keep the team focused on the goal. Don't let them get lost in the details of implementation, so that you can quickly deliver value to your users.

How do I know when something is bite-sized?

Reasonably sized

The work is relatively small and well understood.

Independent

The work is self-contained, such that it can be worked on by itself.

Negotiable

Implementation is flexible, without a specific approach defined.

Valuable

The team understands who the user is and how this work provides value to them.

Verifiable

The team has a clear idea of what it takes to do the work.

There will be larger and smaller units of bite-sized work.

There will be larger and smaller units of bite-sized work. The goal is to scope each task to the smallest chunk of understandable work that still provides clear value to users

An example



Let's say you want to make it easier for the public to identify affordable healthy

food options in their area

Public can find affordable food options in their area

Define the outcome

Public can find affordable food options in their area Ask the team how to get there

Desired outcome:
Public can find
affordable food
options in their area

Technology that lets users search for food options

Desired outcome:
Public can find
affordable food
options in their area

What it takes to get there:
Technology that lets users search for food options

Identify components of the outcome

Database, search tool, suggestion engine

Desired outcome:
Public can find
affordable food
options in their area

What it takes to get there:
Technology that lets users search for food options

Components:
Database of healthy
food sources, search
tool, suggestion
engine

Prioritize and sequence work

- 1. Collect data
- 2. Build database
- 3. Search tool
- 4. Suggestion engine

Decide what's in and out this cycle

Desired outcome:
Public can find
affordable food
options in their area

What it takes to get there: Technology that lets users search for food options Components:
Database of healthy
food sources, search
tool, suggestion
engine

Priority and sequence:
1. Collect data, 2.
Build database, 3.
Search tool, 4.
Suggestion engine

1. Collect data

2. Build database

3. Search tool

4. Suggestion engine

People can find affordable food options Database Search tool :: Suggestion

Desired outcome: People can find affordable food

What it takes to get there: Technology that lets users search for food options Components:
Database of healthy
food sources, search
tool, suggestion
engine

Priority and sequence: 1. Collect data, 2. Build database, 3. Search tool, 4. Suggestion

1. Collect data
2. Build database
3. Search tool
4. Suggestion
engine

In order to collect data for the database...

Define the outcome

Comprehensive data source for healthy food to provide good information

Talk to the team about what it takes to get there

Identify
components
of your
outcome

Prioritize and sequence the components

Decide what's in and what's out for this cycle

In order to collect data for the database...

Ask the team how to get there

Desired outcome:
Comprehensive data
source for healthy
food so the system
can provide valuable
information to users

A good sense of what data is available and a quality ranking Desired outcome:
Comprehensive data
source for healthy
food so the system
can provide valuable
information to users

what it takes to get there: A good sense of what data is available and a quality ranking Identify components of the outcome

Research around sources of data, a rubric to assess quality Desired outcome: Comprehensive data source for healthy food so the system can provide valuable information to users

there: A good sense of what data is available and a quality ranking Components:
Research around
sources of data, a
rubric to assess
quality

Prioritize and sequence work

- 1. Research
- 2. Document
- 3. Develop rubric to assess quality

Decide what's in and out this cycle

Desired outcome: Comprehensive data source for healthy food so the system can provide valuable information to users What it takes to get there:
A good sense of what data is available and a quality ranking

Components:
Research around sources of data, a rubric to assess quality

Priority and sequence:
1. Research, 2.
Document 3. Develop rubric to assess quality

- 1. Research
- 2. Document
- 3. Develop rubric to assess quality

People can find affordable food options Search tool :: Suggestion Research

Desired outcome: Comprehensive data source for healthy food so the system can provide valuable information to users What it takes to get there:
A good sense of what data is available and a quality ranking

Components:
Research around
sources of data, a
rubric to assess
quality

Priority and sequence:
1. Research, 2.
Document 3. Develop rubric to assess quality

Research
 Document
 Develop rubric to assess quality

In order to do research...

Define the outcome

Enough research to be confident that the info will help people find good options

Talk to the team about what it takes to get there

Identify
components
of your
outcome

Prioritize and sequence the components

Decide what's in and what's out for this cycle

In order to do research...

And, so on ...

Until you get down to a small unit: Research healthy food options in Austin, TX

Reasonable size

Relative to other work in the queue the team estimates this is a medium sized task

Independent

Limited to Austin, TX with no dependencies on other cities

Negotiable

The research method isn't specified; just the outcome

Valuable

Understanding the food options in Austin, TX will allow us to help people there find healthy food options

Verifiable

A list of healthy food options in Austin, including location and type of food

People can find affordable food options

People can find affordable food options Database Search tool :: Suggestion

People can find affordable food options Search tool :: Suggestion Research

People can find affordable food options Search tool :: Suggestion Austin, TX

Tips for splitting tasks
http://agileforall.com/wp-content/uploads/2012/01/Story-Splitting-Flowchart.pdf

Practice



Let's break down one of your milestones